

Lesson 2 - The Investigation process

In this lesson you'll use the Investigation Summary form to record:

- ❖ the reason for opening an investigation
- ❖ the animal owner id and location
- ❖ the premises id and location
- ❖ the person responsible for the investigation

You'll also use the Herd Exam form to record:

- ❖ the identity of the diagnostician examining the herd, clinical history, clinical signs, lesions seen, diagnostician's clinical diagnosis and certainty of a foreign or emerging disease.

You'll also use the Specimen Submission form to record:

- ❖ the submitter, animal owner, method shipped, lab sent to, reason for submission, animal numbers and other summary information

You'll also use the Sample Detail form to record:

- ❖ whether individual or groups of samples are submitted, the sample id number and type

The People involved in the work of investigating premises, appraising, removing animals and materials, and cleaning up (investigators, field personnel and support staff) are the primary users of the Investigation module. The Investigation Summary form is used to open all new investigations and initiate all response actions. It's helpful to think of the Investigation Summary form as the *Parent* form. All other forms accessed from the Investigation Summary (such as the Herd Exam form) are *Child* or *Grandchildren* forms.

Step 1

When the Investigation Form is first accessed, the form will have a *PENDING* status. The field for marking the investigation as public or private has a drop down box. Click on the down arrow and make the appropriate selection as shown below.

USDA
Animal and Plant Health Inspection Service
Emergency Management Response System

Choose a view
View Categories
GO Choice

INVESTIGATIONS ADMINISTRATION MY TASKS OFFLINE SERVICES

SAVE MAIL IT HELP

INVESTIGATION SUMMARY

REFERRAL CONTROL NUMBER
PREMISES NAME/OWNER
FORM STATUS
Field for marking Public or Private

PENDING

****PUBLIC****

****PUBLIC****

EMRS Development
VS Alabama
VS Arizona
VS Arkansas
VS California
VS Colorado Area Office
VS Connecticut
VS Delaware
VS Florida
VS Georgia
VS Idaho
VS Illinois
VS Indiana
VS Iowa
VS Kansas
VS Kentucky
VS Louisiana
VS Maine
VS Maryland

Visit Reasons

Initiation reason *

Reason details *

Owner Information

Premises ID NR

Operation Type *

Last Name *

Home Phone

Cell Phone

Company Name*

Address

Work Phone

Address2

Step 2

Select the appropriate initiation reason from the drop down box. Options are **complaint**, **trace**, **vaccination** or **surveillance**. Enter details corresponding to the initiation in the space provided.

Step 3

The Premises ID is a local Generic Data Base, state, or national number used to identify the premises. Data entry is optional, but the id is important in linking this investigation to other information. Use the drop down box to select the Type of Operation as shown below.

USDA
Animal and Plant Health Inspection Service
Emergency Management Response System

Choose a view
View Categories
GO Choice

INVESTIGATIONS ADMINISTRATION MY TASKS OFFLINE SERVICES

SAVE MAIL IT HELP

INVESTIGATION SUMMARY

REFERRAL CONTROL NUMBER
PREMISES NAME/OWNER
FORM STATUS
Field for marking Public or Private

Visit Reasons

Initiation reason *
Reason details *

Owner Information
Premises ID NR

Operation Type *

Last Name *

Beef Breeder
Cow/Calf
Dairy
Dealer
Equine Breeder
Farm
Farrow-to-finish
Feeder Pig Finisher
Feedlot
Game Farm
Garbage Feeder
Livestock Market
Other
Pet Store
Poultry Breeder
Poultry Broiler
Poultry Layer
Poultry Multiplier
Ranch
Residence

PENDING
****PUBLIC****

visit

First Name
Middle Initial

Step 4

Continue to enter information about the premises. Data entry is required in fields with names appearing in bold type. After entering the State Code, click on the icon shown below to access a list of the state's counties.



Step 4

Continue

Step 7

Enter the information requested in the Herd Exam form shown below.

The screenshot shows the EMRS Herd Exam form. The browser window title is "Netscape". The address bar shows "http://dev02.aphis.usda.gov/Readers/EMRSInves.nsf". The page has a green header with the USDA logo and "Emergency Management Response System". A navigation bar includes "INVESTIGATIONS", "ADMINISTRATION", "MY TOOLS", and "OFFLINE SERVICES". A "Choose a view" section has "Investigation Summary" selected. The form itself has a "SAVE" button and a "HERD EXAM FORM" title. It contains fields for "REFERRAL CONTROL NUMBER" (11115175581X), "PREMISES NAME/OWNER" (Figueroa), and "FORM STATUS" (PENDING). The "Investigator Contact Information" section includes a "Reasons" dropdown (Initial), "Assigned Investigator" field with a "Lookup" icon and "Clear" button, "Date Assigned" field, and contact fields for Work Phone, Fax, Cell Phone, Pager, Home Phone, and E-Mail. The "Exam Summary" section has "Exam Date" and "Exam Time" fields. The "Clinical History" section is a large text area. The bottom status bar shows "Document: Done" and the system clock "3:59 PM".

Step 8

Click on the Lookup icon next to the Assigned Investigator field to access a list of EMRS contacts as shown below.

The screenshot shows the "Employee Database Lookup - Netscape" window. It displays a table titled "EMRS Contacts List" with columns: Name, Title, Org, City, St, and Zip. The table lists several contacts, with the first two being Belfrage, John and Boghossian, Aida. The table is scrollable, and the bottom of the list is partially obscured.

Name	Title	Org	City	St	Zip
Belfrage, John	Staff	CEAH		CO	
Boghossian, Aida					
Carr, Robert	Admin	CEAH	Loveland	CO	80539
Cary, Sue	Tech Specialist	usda, aphis, vs, ceah			
Cleveland, Gordon					
Edward, Jim					
Grant, Eric					

Step 9

Click on the clock icon next to any date field to access a calendar as shown below. After clicking on the appropriate date, the date will automatically be entered in the field.



Step 10

You will have to scroll down to access all sections of the Herd Exam form. When entering information in the Physical or Necropsy Exam sections, click on the Question Mark icon to receive an explanation of the type of information requested. Press the **SAVE** button when data entry is complete.

USDA Animal and Plant Health Inspection Service
Emergency Management Response System

Choose a view: **Investigation Summary** View Categories
 Use Summaries by Creation Date: [] GO Choose

INVESTIGATIONS **ADMINISTRATION** **MY TRACK** **OFFICE SERVICES**

Species: [Parakeet (Blue)] # Sick: [] # Dead: [] Number Unaffected Total: [9]

Second Susceptible Species: [] [] [] [9]

Other Susceptible Species: [Alien (Birds)] [] [] [9]
 [Beem] [] [] []
 [Beebe (Cattle)] [] [] []

Total Number in Herd: [9]

Physical Exam

Category	Normal?	Comments
General	[No Exam]	
Skin	[No Exam]	
Head Area	[No Exam]	
Respiratory	[No Exam]	
Cardio - vascular	[No Exam]	
Abdomen Digestive	[No Exam]	
Urogenital	[No Exam]	
Musculo - skeletal	[No Exam]	

Step 11

Click on the **View Inv Summary** button to return to the “parent” Investigation Summary document. Click on the **Followup Forms** button. Select the Specimen Submission Form from the list provided.

Step 12

Enter information requested in the Specimen Submission form shown below. Press the **SAVE** button when data entry is complete.

USDA Animal and Plant Health Inspection Service
Emergency Management Response System

Choose a view: Investigation Summary View Categories
Inv Summaries by Creation Date 60 Choices

SPECIMEN SUBMISSION FORM

REFERRAL CONTROL NUMBER: 1111517501X
PREMISES NAME/OWNER: Pigeros
STATUS: PENDING

Submitter Information

Purpose of Submission:

Submitter: [Lookup](#) [Clear](#)

Address: Submitter Work Phone:

Address2: Submitter Fax:

City: Submitter Cell Phone:

State: Submitter Pager:

County: Submitter Home Phone:

Zip Code: Submitter Email:

Animal Owner Information

Type of Operation: Garbage Feeder

Owner's Last Name: Porky Owner First Name:

Home Phone: Fax Number:

Cell Phone: Pager:

SAVE

Step 13

When a summary of the information entered in the Specimen Submission form appears, click on the **Create Sample** button as shown below.

The screenshot shows the 'SPECIMEN SUBMISSION FORM' in a Netscape browser window. The form is titled 'SPECIMEN SUBMISSION FORM' and includes a 'Choose a view' dropdown set to 'Specimen Submission'. Below the title bar, there are tabs for 'INVESTIGATION', 'ADMINISTRATION', 'MY TASKS', and 'OFFLINE SERVICES'. The form contains several sections: 'SUBMITTER INFORMATION' with fields for Purpose of Submission (FADCT Diagnostic), Submitter Name (Beltage, John), Address (427th Wier 37), City (Pierce), State (CO), County (ARIZONA), and Zip Code (Weld); 'ANIMAL OWNER INFORMATION' with fields for Type of Operation (Cow/Calf), Owner's Last Name (Coke), Home Phone (235-532-3532 x5), Cell Phone (235-932-5775 x5), Owner Company Name (Company Name), Address (Address1), City (City), State (AZ), and Zip (3296935). The form also includes a 'SAVE' button and a 'View Source Investigation' button. The bottom of the browser window shows the taskbar with various applications open.

Step 14

Press the **SAVE** button when data entry in the Sample form shown below is complete.

Step 15

Click on the **View Source Investigation** button to return to the “child” Specimen Submission document. Click on the **View Source Investigation** button to return to the “parent” Investigation Summary document.

The screenshot shows the 'SAMPLE' form in a Netscape browser window. The form is titled 'SAMPLE' and includes a 'Choose a view' dropdown set to 'Specimen Submission'. Below the title bar, there are tabs for 'INVESTIGATION', 'ADMINISTRATION', 'MY TASKS', and 'OFFLINE SERVICES'. The form contains several sections: 'SAMPLE INFO' with fields for Species (Brood), Sample ID, Sample Quantity, Sample Type, Animal ID (single or range), and Age; 'FILE ATTACHMENTS' with fields for File Upload and File Upload; 'DOCUMENT HISTORY' with fields for Document Editor, Document Creator, and Document Date. The form also includes a 'SAVE' button and a 'View Source Investigation' button. The bottom of the browser window shows the taskbar with various applications open.

Step 16

Click on the **Assignments and Forms** tab to access Assignments and Forms Investigation Summary shown below. Click on the **EDIT** button.

USDA
Animal and Plant Health Inspection Service
Emergency Management Response System

Choose a view: Investigation Summary View Categories
Inv Summaries by Creation Date 60 Choices

INVESTIGATIONS ADMINISTRATION MY TASKS OFFICE SERVICES

EDIT NEW INVESTIGATION SUMMARY FOLLOW-UP FORMS MAP MAIL IT HELP

INVESTIGATION SUMMARY

REFERRAL CONTROL NUMBER: 1116715-49980
 PREMISES NAME/OWNER: ELTON P. JOHN
 FORM STATUS: ASSIGNED
 Field for marking Public or Private: ****PUBLIC****

Contact Summary **Assignments and Forms** Disposition and Controls Distribution & Changes All Sections

Investigation Coordinator:

Step 17

Click on the Lookup icon next to the Assignment Officer field of the Investigation Coordinator section to access a list of EMRS contacts. The investigation coordinator must be an Area Veterinarian in Charge, a READEO Section Head or a Disease Reporting Officer. Press the **SAVE** button when data entry is complete.

USDA
Animal and Plant Health Inspection Service
Emergency Management Response System

Choose a view: Investigation Summary View Categories
Inv Summaries by Creation Date 60 Choices

INVESTIGATIONS ADMINISTRATION MY TASKS OFFICE SERVICES

EDIT NEW INVESTIGATION SUMMARY FOLLOW-UP FORMS MAP MAIL IT HELP

INVESTIGATION SUMMARY

REFERRAL CONTROL NUMBER: 1116715-49980
 PREMISES NAME/OWNER: ELTON P. JOHN
 FORM STATUS: ASSIGNED
 Field for marking Public or Private: ****PUBLIC****

Contact Summary **Assignments and Forms** Disposition and Controls Distribution & Changes All Sections

Investigation Coordinator:

Assignment Officer*	Carr, Robert
Date Assigned *	11/07/2001
Work Phone	570-499-9998
Fac	570-499-9999
Cell Phone	976-499-9957
Pager	979-456-8852
Home Phone	979-456-8899
E-Mail	rcarr@juno.com

Follow-up Forms:

Form	Create Date	Status	Assignee
Herd Examination	11/07/2001	✓ COMPLETED	Beltrago, John
Specimen Submission	11/07/2001	✓ COMPLETED	Carr, Robert
Trace Summary	11/07/2001	✓ COMPLETED	Cleveland, Gordon
Questionnaire	11/08/2001	⚠ Pending	Carr, Robert